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Vol. 103 □ No. 24

Broadcasting Dec 13

Radio Marti, H.R. 5949, TV in Senate near death in lame-duck session □ RKO cleared for move to New Jersey □ AM stereo: Delco picks Motorola □ Paine Webber postulators

DELCO ENDORSEMENT □ Largest domestic maker of auto radio backs Motorola's AM stereo system. **PAGE 32.**

WOR-TV TO CROSS HUDSON □ FCC approves move to Secaucus, N.J., clearing way for five-year license renewal to RKO General and complying with congressional strategy to give New Jersey its first commercial V. **PAGE 33.**

SO, LONG, RADIO MARTI □ As lame-duck session winds down, chances dim for passage of legislation to establish radio service to Cuba. **PAGE 34.**

GAO PROBE OF NTIA □ Gould and Wunder say report to Hill is vindication of agency activities, but DeConcini contends it reflects poor administration. **PAGE 35.**

CABLE COPYRIGHT BITING THE DUST □ Hopes for passage of H.R. 5949 dashed by committee postponements. **PAGE 37.**

THREE OUT OF THREE □ ABC-TV affiliates join CBS-TV and NBC-TV stations in calling for repeal of syndication and financial-interest rules. **PAGE 37.**

MORE DISTANT SIGNAL RUMBLINGS □ Copyright Royalty Tribunal asks U.S. Court of Appeals to reject NCTA filing against tribunal's order for increased rates for cable. But support for NCTA surfaces from Hill as Kastenmeier enters statement at court backing cable association. **PAGE 50.**

FCC STAYS PUT □ Controversial attempts to move commission from Washington ends with new five-year lease for present headquarters. **PAGE 50.**

BREACH OF PROMISE □ Appeals court upholds FCC denial of renewal for San Diego FM that didn't live up to its word about correcting programing deficiencies. **PAGE 56.**

BLESSINGS FOR NOMINEES □ Senate Foreign Relations Committee unanimously endorses former *Reader's Digest* editor Tomlinson as VOA head. **PAGE 56.** Economist George Douglas has easy time before Senate Commerce Committee which recommends his confirmation as FTC commissioner. **PAGE 62.**

NBC, TIO ARCH BACKS □ Network and association rebut *Newsweek* piece that extols Gerbner's theory on how TV distorts reality in minds of viewers. **PAGE 66.**

WHERE MEDIA THINGS STAND □ At three-day Paine Webber conference, analysts get input on past, present and future of Fifth Estate. Advertising panelists see slowdown in rates and only modest increases in revenues. **PAGE 78.** Broadcasters concede shares may be down, but sponsors are still signing up. **PAGE 80.** Bullish attitudes, though somewhat tempered, remain in cable. **PAGE 81.** Wirth's chief counsel downplays roles of regulators in business. **PAGE 82.** Capsules of presentations at the conference by leading communications firms start on **PAGE 82.**

AAF THEME: DISCRETION □ Association's annual law conference hails explosion of new technologies, but speakers say industry must regulate itself where government is leaving off. **PAGE 84.**

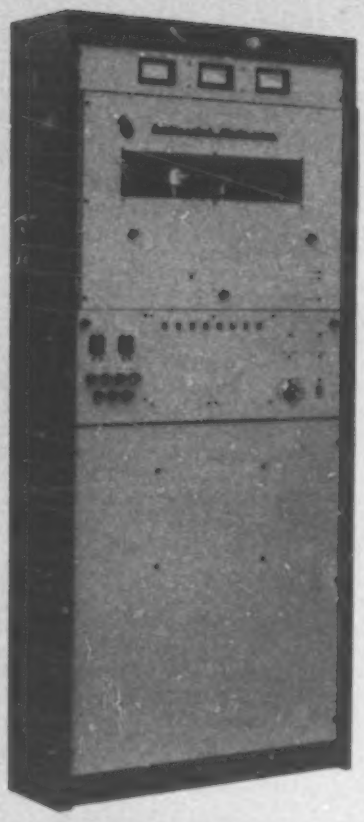
FOX HUNTER IN PAY TV □ As president of 20th Century-Fox Pay Television, Andrew Wald has other studios keeping close watch on his pioneering efforts in emerging medium. **PAGE 103.**

INDEX TO DEPARTMENTS

Business	78	Datebook	22	In Brief	104	Monitor	76
Business Briefly	14	Editorials	106	In Sync	86	Open Mike	26
Cablecastings	8	Fates & Fortunes	100	Law & Regulation	50	Programing	74
Changing Hands	72	Fifth Estater	103	The Media	96	Riding Gain	42
Closed Circuit	7	For the Record	87	Monday Memo	12	Stock Index	68

Broadcasting (ISSN 0007-2028) is published 51 Mondays a year (combined issue at yearend) by Broadcasting Publications Inc., 1735 DeSales Street, N.W. Washington, D.C. 20036. Second-class postage paid at Washington, D.C., and additional offices. Single issue $1.75 except special issues $2.50 (50th Anniversary issue $10). Subscriptions, U.S. and possessions: one year $55, two years $105, three years $150. Canadian and other international subscribers add $20 per year. U.S. and possessions add $170 yearly for special delivery, $100 for first-class. Subscriber's occupation required. Annually: *Broadcasting* □ *Cablecasting Yearbook* $65, *Across the Dial* $3.95. Microfilm of *Broadcasting* is available from University Microfilms, 300 North Zeeb Road, Ann Arbor, Mich. 48106 (35mm, full year $35). Microfiche of *Broadcasting* is available from Bell & Howell, Micro Photo Division, Old Mansfield Road, Wooster, Ohio 44691 ($27.50/yr). Postmaster please send address corrections to *Broadcasting*, 1735 DeSales St., N.W. Washington, D.C. 20036.

INDEX TO ADVERTISERS ■ All American Television 77 □ American Chemical Society 46 □ American Chiropractic Association 81 □ American Telephone & Telegraph 75 □ Bennett Group 54-55 □ Blackburn & Co. Inc. 72 □ Bogner 71 □ Columbia Pictures Television 6, 15, 52-53 □ Continental Electronics 74 □ Delta Air Cargo 10 □ Doubleday Broadcasting Co. Back Cover □ Enter-tel Inc. 78 □ Gannett Front Cover, 58-59 □ Garden Way Marketing Assocs. 4 □ Gaylord Broadcasting 51 □ Harris Corp., Broadcast Products Division 39, 80, 81 □ Ted Hepburn Company 73 □ ITC Entertainment 40-41 □ Mutual Broadcasting System 57 □ MCA-TV 19, 30 □ Mobil Showcase Network 79 □ Motorola 43 □ National Federation of Independent Business 76 □ George T. Rodman Inc. 101 □ SFM Holiday Network 60-61 □ Sony 24-25, 44-45, 64-65 □ Howard E. Stark 18 □ Station Business Systems 69 □ Storer Broadcasting 48-49 □ Joe Sullivan & Associates Inc. 14 □ William B. Tanner 102 □ Telepictures Corporation 16-17 □ Television Program Enterprises 27 □ Tobacco Institute 83, 85 □ Torbet Radio 13 □ Tribune Productions Inc. 67 □ Turner Program Services Inside Front Cover/Page 3 □ TV Log 62, 66, 70 □ 20th Century-Fox Television 28-29 □ Utility Tower 9 □ WBBM-TV 63 □ WSPA-TV Inside Back Cover □ Warner Brothers Television Distribution 20-21 □ Watermark 47 □ Wilbur Awards 76 □ Xerox 11 □



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Public willing to pay for sports, says B&B study

While many object to removal of major events from free TV, they would pay to see them

Although 81% of men and 67% of women would be "angry" if major sports events such as the World Series, the Super Bowl and the Olympic games were taken off free television, a majority of viewers still would be willing to pay per event if these games were not available on regular television.

This is one of the highlights of a study conducted by Benton & Bowles last August (before the National Football League strike). The survey is based on 1,714 usable returns out of 3,000 households in the B&B Consumer Panel.

Underscoring the interest of viewers in major sports contests, 32% of the respondents said they would be willing to pay $3 or more for the Super Bowl; 25% would pay that amount for the final game of college basketball championships; 16% would pay for a major boxing championship and 13% for the Kentucky Derby and the Indianapolis 500. Substantial percentages said they would pay $1 to $2 for these events.

Similarly, 28% would pay $3 or more for single-day coverage of the Olympics and 20% would pay that amount for a single game of the World Series. In addition, 35% of the men and 23% of the women said they would sign up for pay-cable coverage of their favorite football team if it were not otherwise available, and 24% of men and 19% of women would act similarly for their favorite baseball team.

The majority of respondents rejected the idea of commercials appearing on a telecast for which they had paid a specific price. Only 25% said they would accept commercials if they knew it would reduce the price.

Two out of three canvassed believe the Super Bowl and the World Series still will be on free television in the next five to 10 years, while the remainder expressed the belief these events will wind up on pay cable within that time span.

The study, titled "Sports on TV: The Viewer Speaks Out," also examines peoples' reactions to athletes as endorsers. A few, such as Jack Nicklaus, Chris Evert Lloyd and Sugar Ray Leonard, scored consistently high in familiarity, likability and believability. Others such as John McEnroe, Jimmy Connors and Bjorn Borg rated high on familiarity but were below average on likability and believability. Reggie Jackson topped the list as best known, but scored only average on likability when endorsing a product and was in the bottom half on believability. □

Ratings Roundup

Finishing a stunning 3.5 points agead of second ranked ABC-TV and 5.4 points ahead of NBC-TV, CBS-TV won the 10th week of the 1982-83 prime time season, and widened its lead over the other networks in season-to-date ratings. In addition to winning Thursday, Friday and Sunday as it usually does, CBS topped ABC on Saturday (Dec. 4) with a Hallmark Hall of Fame special, *Witness for the Prosecution*, leaving ABC with wins on only Tuesday and Wednesday. NBC's broadcast of part two of its made-for-TV movie, *The Executioner's Song*, outranked by nearly six points ABC's *Monday Night Football*, a matchup between the Miami Dolphins and Tampa Bay Buccaneers, giving that night to NBC.

For the week ending Sunday, Dec. 5, CBS averaged a 20.2 rating and 31 share over ABC's 16.7/25.9 and NBC's 14.8/23. CBS's seventh full-week victory this season also advanced it in season-to-date ratings slightly, leaving it with an average 18.5/30 against ABC's 16.7/27 and NBC's 15.7/25. ABC has won one week so far this season, and NBC, boosted by five prime time World Series games, has won two.

Executioner's Song (24/36) demolished *Monday Night Football* (18.5/30), giving NBC an average of 22.4/32.9 for the night against 18.5/27.1 for ABC and 17.9/26.1 for CBS. On Saturday, *Witness for the Prosecution* (19.1/31) overshadowed ABC's usually winning lineup of *Love Boat* (17.7/28) and *Fantasy Island* (16.3/28), giving CBS an average for the night of 17.8/29 over ABC's 16.4/27 and NBC's 11.5/18.9.

The First 20

1.	*Dallas*	CBS	28.3/45
2.	*All-Star Party for Carol Burnett*	CBS	25.9/38
3.	*Three's Company*	ABC	24.5/35
4.	*60 Minutes*	CBS	24.3/37
5.	*Circus of the Stars*	CBS	24.3/37
6.	*NBC Monday Night Movie*—"The Executioner's Song, Part II"	NBC	24.0/36
7.	*M*A*S*H*	CBS	23.8/33
8.	*Falcon Crest*	CBS	22.8/39
9.	*G.E. Theatre*—"Something So Right"	CBS	22.6/36
10.	*Simon & Simon*	CBS	22.3/34
11.	*Magnum, P.I.*	CBS	21.9/34
12.	*Laverne & Shirley*	ABC	21.9/32
13.	*Happy Days*	ABC	21.2/32
14.	*Newhart*	CBS	20.7/29
15.	*Dynasty*	ABC	20.6/32
16.	*9 to 5*	ABC	20.0/30
17.	*Hallmark Hall of Fame*—"Witness for the Prosecution"	CBS	19.1/31
18.	*Little House New Beginning*	NBC	19.1/27
19.	*Hill Street Blues*	NBC	18.8/31
20.	*Knots Landing*	CBS	18.5/31

The Final Five

64.	*Gavilan*	NBC	10.6/16
65.	*St. Elsewhere*	NBC	10.5/17
66.	*Star of the Family*	ABC	10.2/16
67.	*Voyagers*	NBC	10.0/17
68.	*Devlin Connection*	NBC	8.7/15

Paine Webber media seminar searches for answers

Broadcast, advertising, cable and government regulators meet to discuss the Fifth Estate's future

Whether the medium is the message may still be open to debate—but there can be no doubt that messages about the media are in high demand. Witness the attention generated last week by The Tenth Annual Conference on the Outlook for the Media sponsored by Paine Webber Mitchell Hutchins. The three days of discussion and presentations that Paine Webber analyst J. Kendrick Noble Jr. hosted in New York were largely for the benefit of other analysts and money managers who follow the various media businesses. Monday's sessions included panels on broadcasting and cable as well as newspapers, magazines and data-based industries; the next two days were devoted to reviews by individual companies of their businesses and outlooks. Some measure of the importance those companies accord the conference can be gleaned from the roster of speakers, who included the chairmen or presidents of Gannett, Harte-Hanks, Multimedia, Knight-Ridder, Affiliated Publications, Dow Jones and Cox Communications, among other media concerns.

Revenue increases in the 12% to 14% range are virtually "signed and sealed" for the three television broadcast networks in 1983, but the spot television market can't expect a continuation of this year's pattern, when 22% revenue gains in the first quarter helped generate a 15% increase for the full year over 1981. That was the word McCann-Erickson USA's Robert Coen gave the conference.

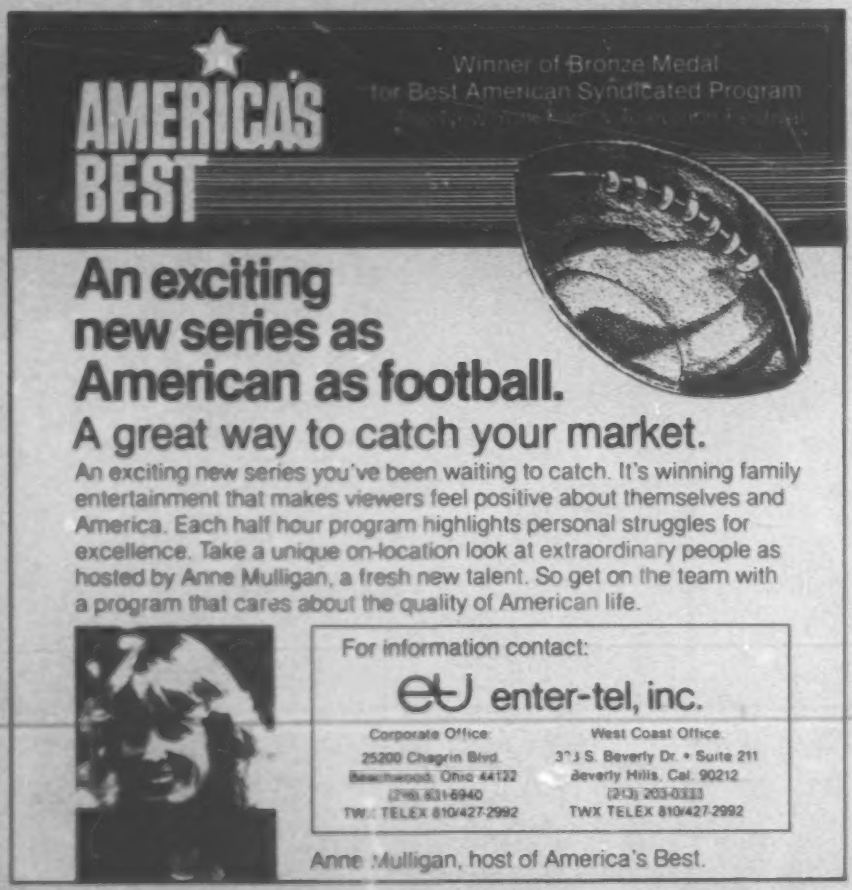
Coen also said stations "from here on out will find the days of getting double-digit rate increases" for national spot buys are gone. And although 1982 proved an "abnormally good year for spot," Coen expects total national spot dollars in 1983 to be up only 6% to 8%, the same level of increase he expects for national radio advertising.

Reviewing the 1982 revenue gains of the various media, Coen presented his latest estimates in the charts on page 80. He noted that the 15% spot growth was a "real surprise," reflecting "a lot of spillover from network," with the radio, magazine and newspaper national numbers not quite as good as expected. The 16% direct mail jump was another "big surprise." Although local television experienced an 11% climb, the overall local advertising growth of 6.6% was "not the kind we were looking for," Coen said. His forecast for 1982 had included an 11.9% local gain. Total advertising is likely to end the year with a 9.5% increase to $67.33 billion, less than Coen's year-ago prediction of an 11.7% climb.

In assessing the advertising picture, Coen noted that while 1982 wasn't as bright as he and others anticipated, it did log exceptional performance when compared with the general economy. Coen attributed that to several factors, a primary one being the first use in a recession of large advertising expenditures as a means of inventory control—car manufacturer rebate promotions, for example. Political advertising, strong new product introductions and heavy competitive spending to protect market share were other factors. Coen's listing of changes in spot TV expenditures by product category demonstrates those points—automobiles and airlines increased their spot spending 29% and 26%, respectively, in the first nine months of 1982; pet foods, 36%; consumer electronics, including video games, 112%.

Looking ahead to 1983, Coen expects advertising to be "a shade better" than growth in the gross national product, 9.2% to the GNP's 9%. He is looking for total broadcasting, in that framework, to increase 11%; national print 8%; other national advertising 10%, total local 8.3%. Those aren't great numbers for the media. Coen thinks 1983 may well see the smallest percentage gain in total advertising since the mid-1970's. But he also expects economic recovery to be in the cards for 1984, and says that year might well turn out to be a "mini-1976" (when advertising advanced 19.5%).

Joining Coen on the advertising panel were Ogilvy & Mather's Ken Caffrey, and J. William Wardell, of Doyle Dane Bernbach International. Caffrey focused his attention on developing trends in advertising, particularly the increased use by advertisers of marketing information to formulate more efficient, albeit complex, media plans. Advertisers, he said, "are demanding accountability—they question in detail how their dollars are spent." Aware of both the changes taking place in American society, and the state of "flux" in which the advertising media find themselves, advertisers are looking hard to see if their advertising is effective. One specific trend Caffrey sees is that for many advertisers local advertising has replaced network. In the question and answer session that followed he also suggested "the industry may begin a major swing back toward the radio medium by national advertisers," as part of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Anne Mulligan, host of America's Best.

followed he also suggested "the industry may begin a major swing back toward the radio medium by national advertisers," as part of an approach to declining TV network shares.

Doyle, Dane's Wardell devoted his remarks to "creativity"—creativity and hard work on the part of agencies in making an advertiser's dollars go farther by securing favorable positioning, such as timely juxtapositions of advertising and editorial content.

TV: shares may be down but advertisers keep flowing in

Broadcasting's prospects were examined from several levels by a panel that included CBS/Broadcast Group vice president, research, David Poltrack; Gannett Broadcasting President Alvin G. Flanagan; Gary Stevens, president of Doubleday Broadcasting, and Warner Bros. Television's Executive VP Ed Bleier.

Poltrack argued for "the continued vitality of the network television medium" and projected that 1982 network revenues would close the year up "in the high single digit range" with a 12% to 13% increase in 1983. The network researcher then turned his attention to network advertising vitality and network share erosion.

Recession, he said, hasn't slowed "the dynamics of the network television marketplace." In the first half of the year, Poltrack said, 54 new advertisers came into network television, as many as did in all of 1980. Since 1980, 15 new product categories have appeared on network television, with others such as video games becoming major advertisers. In this year's upfront selling season 26 new upfront advertisers added $200 million new network dollars, six advertisers doubled their 1981-82 commitments, and 11 more upped theirs 50% or more. Upfront selling, he said, grew 24% from the previous year, or $400 million. Fourth quarter selling, Poltrack added, is strong, and first-quarter scatter "has broken early and also looks promising."

Turning to efficiency and share erosion, Poltrack said that: Season to date, prime time network share is down from 86% the year earlier to 82%, attributable in part to the football strike, and also to election night, where a 50% network share compared with 83% that night the year earlier. Adjusting for those factors, Poltrack said "real" network decline was 2 to 3 share points, and he projects a 1982-83 full season share of 78% against the previous season's 80%.

Poltrack said those figures are in line with the network's projection of 70% three network share by 1990, when he expects 85% of the country to be wired for cable. And he added, CBS even thinks that a reversal of the share erosion trend may occur by then, and is preparing a "full presentation" on the subject.

As to the efficiency of network advertising, Poltrack suggested that "advertising decisions are made on a cost/benefit basis as opposed to a strict audience-per-dollar basis," and that network ad impressions have different values for different advertisers. As the economy rebounds, he argued, each network impression increases in value, as the audience's discretionary income increases. New marketers wishing to tap those dollars will more than make up for "the revenue lost due to the abandonment of the medium by those marketers that find the cost of network television exceeding the benefits derived from that advertising," he claimed.

There's still nothing to replace network advertising, Poltrack maintained—his figure is that "last season's 80% prime time network share translated to an 87% share of audience impressions for sale to advertisers" and that a 70% share in 1990 will "translate to an 80% share of audience impressions."

Poltrack closed by saying "the networks are not indifferent to the advertisers concerns," and CBS, he said, is addressing those concerns three ways—internal cost controls, multi-daypart selling, and aiding advertisers with research.

Gannett's Flanagan continued something of a similar theme, saying that television advertising dollars "are not allocated as a percentage of retail sales" but on the basis of a combination of such factors as market size, brand needs, number of distribution outlets in an area. Television, he said, "is not an advertising medium—it's actually the best sales person on a company's staff," and large companies "cannot afford to cut advertising during a sales slump."

Flanagan turned to his figures for this year, saying television revenues in total will be up 14% to 17%; national spot increases will be up 10% to 16% at stations, with the average increase 13%, and local revenues up 13% to 15%, with the average 14%. Looking at 1983, with most analysts predicting recovery, Flanagan said stations will be up 10% in the first two quarters, with recovery during the year leading to 15% to 17% increases for the full year. Recovery, he said, "will be felt more locally than nationally, and local will be up more than national spot" next year. Not only that, but "as television advertising continues its growth in 1983 into the years to come," Flanagan predicted "the value of television stations will increase" as well.

The outlook for the radio side of the business isn't quite as rosy, in the view of Doubleday's Stevens. Revenues are up, but profits down, he noted, and that the margin shrinkage problem is one "no noninventory, noncapital intensive business should have."

Part of the difficulty, Stevens maintained, is that there are few "radio only" companies in the business—with most major radio

Paine Webber's advertising analysis

National advertising—1982 vs. 1981

	1981	1982	% change
Network TV	$ 5,575,000,000	$ 6,275,000,000	+13
Spot TV	3,730,000,000	4,290,000,000	+15
Radio	1,109,000,000	1,185,000,000	+ 7
Magazines	3,533,000,000	3,745,000,000	+ 6
Newspapers	2,729,000,000	2,975,000,000	+ 9
Direct mail	8,918,000,000	10,345,000,000	+16
Other media	8,846,000,000	9,670,000,000	+ 9
Total	$34,440,000,000	$38,485,000,000	+11.7

The Outlook for 1983

	1983 over 1982	% change forecast
National broadcast	$13,015,000,000	11
National print	7,225,000,000	8
Other national	22,065,000,000	10
Total national	42,305,000,000	9.9
Total local	31,245,000,000	8.3
Grand total	$73,550,000,000	9.2

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groups owned by "big television companies," but with the mechanics of the two industries vastly different. For example, he said, in radio, "you can spend five to six years building a station, and lose it all on two bad ratings books" something that would never happen in television. While cost control is essential in a business dependent on margins, "there's a lot of runaway promotion piling up on the expense line" of many radio operations—local radio, Stevens noted, is the fourth or fifth largest local television advertiser.

Aside from local radio, radio networks are "collectively losing money" Stevens said, and rhetorically asking "is cable bleeding radio revenues?" he answered "I couldn't agree more." Stevens particularly mentioned that next year he expects to see some diversion from radio of record industry advertising to Warner Amex Satellite Entertainment's MTV cable rock music network.

Finally, Stevens said that radio today "is an asset play, not an investment play." Where some companies are "cashing in their chips," others, including Doubleday, are stepping up to take their place, believing that radio is a good business. Doubleday will, however, "thin out our AM holdings" Stevens said, and is prepared to sell properties for book value or less. But overall, "the ball game for radio today is where it was—in the margins."

Ed Bleier of Warner Bros. Television approached the future of the broadcasting business by suggesting issues for consideration, rather than offering answers. Factors that have to be "cranked into" projections, Bleier said, are the impact of the recent Copyright Royalty Tribunal decision on cable royalty payments; whether the economics for ad hoc networks or a fourth network are changing, as cable expands the reach of UHF stations and advertisers continue to seek alternatives to the three networks, and "at what point does an affiliate want to chart its own destiny?"

Bleier further argued that the networks have "made a strategic mistake" in pushing for the recision of financial interest and syndication rules, a mistake that's causing a "schism between the networks and their suppliers." And he predicted "substantial efforts to create alternatives to our principal customers" on the part of program producers, if those rules are repealed.

Cable: bullish attitudes, although slightly tempered, remain

Varying perspectives on the cable industry's future were provided attendees of the Paine Webber conference by representatives of three cable operators and the largest pay service, HBO.

HBO President James Heyworth began the discussion by saying that consumer demand for pay services has risen faster than that for basic cable, with the current industry ratio of pay to basic 65%.

Noting that improved reception is not the key to pay cable demand in urban areas, Heyworth said "multiplicity of choice is what fuels the growth." There's a "revolution well under way" in pay cable—multipay—Heyworth claimed, adding that by year end 75% of HBO subscribers will be in multipay markets. Differentiation of the several pay services will be a key to their success in the future, Heyworth maintained, and they'll need exclusive programing to achieve that—sports and specials as well as "a substantial number of major movie exclusives." Heyworth candidly noted that "the financing clout of HBO is a key factor" in its ability to achieve that end. (Heyworth's network, along with Columbia Pictures and CBS, a week earlier anounced a joint venture to produce films, with a pay exclusivity provision for HBO [BROADCASTING, Dec. 6]).

Looking at the separate issue of advertiser-supported cable, Heyworth noted it's been slow to develop, saying that's because "everybody forgot the fundamentals"—that even with a 15-million subscriber base, the 1 or 2 ratings basic cable networks are pulling only deliver 300,000 viewers and that "as CBS Cable sadly found out" expensive programing can't be produced for such audiences if advertisers are expected to foot the bill.

Vertically programed basic cable services—news, sports, etc.,—will do OK," Heyworth said, but he also predicted that ad-supported cable channels will develop into "a place to see older TV series and movies." The business plan for USA Network, in which HBO's parent, Time Inc., holds a third interest and which HBO markets, in fact calls for it to "pick up old off-network series."

While USA has in the past also been said to be an eventual vehicle for pay-per-view for Time and partners MCA and Paramount, Heyworth's comments to the conference last week were that "pay-per-view will play a sec-

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ondary role to subscription cable services" given the "elegant efficiency" of subscription service and the limited product Heyworth considers suitable for pay-per-view.

Capital Cities Communications, in the words of William H. James, senior VP, cable TV operations, is "bullish on cable" with some caveats—that systems be "mid-size" and acquired "at the right price." James thinks there's room for continuing growth in subscriber levels even after a system has been fully marketed, and said a 65% basic penetration level "is not an impossible target."

Capcities has been seeing "a lot of churn in multipay," but at the same time is finding that while pay-to-basic levels eventually back down somewhat in new builds, rebuilt older systems are experiencing pay growth and "the two numbers are coming closer together."

On system pricing, James said he sees some indications that asking figures for existing systems are coming down."Some people are overextended," he suggested, adding "like in real estate the second person in may do better" with a given property.

By mid-1985, Capital Cities will have only 5% of its base with fewer than 35 channels of service, and will spend $50 million to achieve that. For now, the company is finding "the early returns of rebuilds very exciting," yielding not only increased pay penetration, but basic lift as well.

The New York Times Co. view of cable was provided by David MacDonald, group director, Times Cable Group, who called cable "really a simple, down-to-earth business."

MacDonald was bullish on HBO, saying "you have to have HBO," and that with four pay offerings—HBO, its companion, Cinemax, a pay sports package and the Entertainment Channel—churn in the Times's New Jersey systems is "trending down," the reverse of the national experience.

The Times also sees a "tremendous potential" in pay-per-view, one that's not limited to "blockbuster" events or movies. MacDonald said individual sporting events and professional educational programs hold that potential.

Some support for large urban systems was offered by John Dillon of Cox. "One reason we're active in franchising," Dillon said, is that "we can use all the tax benefits." In 1982 Cox "had an appetite for tax benefits that went beyond what the cable unit generated."

Washington: Hill says business' business won't be in capital

For those analysts attempting to assess the impact of federal regulators and legislators on the Fifth Estate, David Aylward, chief counsel to the House Telecommunications Subcommittee, posed a solution. "We're not very important," said Aylward, at least not now.

Aylward gave that advice last week to media analysts attending the 10th annual media-outlook conference in New York sponsored by Paine Webber Mitchell Hutchins Inc.

He told the analysts that their assessments and conclusions should be based on "smart or not-so-smart investments and management decisions" from within the industry itself. Not that Washington should be ignored, he said, but for the most part analysts should make their recommendations based on management and product-related concerns.

Federal policies in place today governing the mass media, "are not that intrusive," said Aylward. "Their removal won't have great impact."

He said the FCC "wants to deregulate in the worst way—they have the votes, but no power." He praised the Fowler commission, however, for avoiding the protectionist policies of past administrations, as evidenced by the commission's recent decision eliminating restrictive rules on STV subscription television broadcasting.

And if it promotes diversity, Aylward suggested, deregulation may be desirable. As an example, he cited radio. "There's a consensus that it's a competitive industry," he said. And that, coupled with the apparent willingness of radio broadcasters to pay a mild spectrum fee, may lead to radio deregulation in the next Congress, he said.

Television, however, is another matter. Aylward noted that his boss, Tim Wirth (D-Colo.), chairman of the Telecommunications Subcommittee, does not believe that the television business is competitive. "Others are moving in," Aylward acknowledged, "but they're not there yet."

Aylward also suggested that trade groups, such as the National Association of Broadcasters, may now be persuaded to consider real compromises on deregulation issues. With a Republican Senate aligned with the Reagan administration, "they thought their wish list for the next 10 years would be granted," he said. "It didn't happen and it won't happen."

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News vignettes from Paine Webber

The Spotlight partners have, for the present, rejected all "overtures" to link up with other pay cable services; Harte-Hanks is looking to sell two radio stations; Multimedia is set to announce production of a two-hour special starring Ronnie Milsap, and Knight-Ridder has an agreement to explore teletext with the *Seattle Times*. Those were some of the news items sandwiched in amongst a wealth of statistical information and expressions of business philosophy provided by the extensive roster of companies which made presentations last week during the three days of the Paine Webber conference on "Outlook for the Media."

Some of the highlights of those presentations:

Cox Communications

Putting in his first conference appearance as chairman of the Cox Communications (nee Cox Broadcasting) Clifford Kirtland spoke of the "positive changes" the company experienced this year. As detailed by vice president, finance, John Dillon, the changes included a projected 27% revenue increase for 1982, to over $500 million, with earnings per share expected to be up 14% to $2.30 or $2.35. Broadcast revenues should be up 18%, operating income 15%; cable revenues up 39%, operating income 23% for the year.

Kirtland walked the analysts through the broadcasting numbers—local revenues up 16% for the first nine months, national spot up 22% in that period. Ratings at Cox's television properties are "solid," he said, and while radio revenues were off somewhat because of a national spot shortfall the group still had "excellent margins and cash flow." Some Cox radio operations are undergoing "rebuilding" and the popularity of the Schulke radio syndication arm, which has suffered slippage in popularity of its beautiful music format, is conducting research to "bring beautiful music back."

Cox's STV operation in St. Louis "has not met our expectations," Kirtland said, though the corporation takes some comfort in the "consumer preference for cable" the situation seems to indicate. He also referred to the "synergies" of the company's rep firms—Christal, TeleRep and CableRep—calling TeleRep "the best performing profit center in the company this year." But it was later noted the company has ratcheted back its forecasts for CableRep to $8 million to $10 million revenues seven years out.

Cox Cable President Robert Wright conducted a detailed discussion of that unit's operations, noting that subscriber growth in 1982, though "good," was below initial projections. This year was plagued with disconnects, bad debt and construction delays, as well as a significant churn problem caused by a combination of Cox's aggressive selling of pay services and consumer perceptions of duplication. Cable revenues for 1982 will be $188.5 million, he estimated, with earnings hitting 30.5 million.

One effort on which Cox is embarked is a new marketing, packaging and pricing program, Wright said, designed to increase revenues and decrease churn.

Times Mirror

Broadcasting has been "the beacon and the highlight of the Times Mirror operating performance" for the last two years, company Vice President and Treasurer Stender Sweeney told the media conference attendees, in introducing Times Mirror Broadcasting President John McCrory. McCrory reviewed the "unusual year for spot" that was 1982, with football's negative impact offset by hefty political spending. The average industry estimates of 14% full year spot improvement have been "close to our experience," he added. And he recited the Television Bureau of Advertising's 1983 estimates of 13% to15% local advertising gains, 12% to 14% in national spot. On the whole, McCrory is "very sanguine" about 1983.

Meanwhile, Greg Liptak, executive vice president of Times Mirror Cable Television, said he sees as a top 1983 priority in the buildout of five major new build projects and improving margins in the 61 systems in 16 states through which Times Mirror now serves 800,000 basic subscribers.

It was Liptak who provided the word that the MSO's in partnership in the Spotlight pay cable network "as late as last Thursday" saw "no reason to change the major objectives" of the partnership, although they will "continue to listen to suitors." Liptak put breakeven for Spotlight at 1.5 million subscribers, which the partners believe will be achieved in 1983. Spotlight now has 700,000 subscribers.

Knight-Ridder

Knight-Ridder Newspapers announced last week that it has come to an agreement with the *Seattle* (Wash.) *Times* to form a joint videotext venture, comparable to agreements already reached with the *Boston Globe*, the *Baltimore Sun* and Capital Cities newspapers in Fort Worth and Kansas City, Mo. That means that the Seattle paper will monitor Knight-Ridder's videotext experiment in south Florida, scheduled for late 1983, and then make a decision on whether to proceed with the planned joint venture in its home city.

The announcement came during the Paine Webber conference.

James Batten, president of Knight-Ridder, told analysts attending the conference that his company has spent between $26 million and $27 million on Viewtron, Knight-Ridder's videotext service, since 1979, and will spend another $8 million in 1983. He said the 1983 expenditures on Viewtron may cost stockholders about 12 cents per share but characterized the expense as a "good risk that should pay off handsomely in the late '80's and beyond."

Batten said Knight-Ridder will complete its initial obligation toward its joint cable venture with Tele-Communications Inc. to purchase cable systems with a total of 110,000 subscribers in 1983. So far the venture has bought systems in central and southern New Jersey totaling 90,000 subscribers and will purchase a Rockland County, N.Y., system next year with about 20,000 subscribers. Knight-Ridder's half interest in the venture at that point will total $55 million.

By the end of 1982, Batten said company revenue from its five television outlets would total about $43 million, up 8%, and that operating profits should be up by 4% to 6%. In 1983, he said that revenues should be up another 6% to 7%, while earnings are expected to increase by 7% to 10%. "And if the economy picks up," those figures may be higher, he said.

Knight-Ridder is also getting into the cellular radio business. It has applied for Florida franchises in Orlando, Jacksonville and Miami and will apply for West Palm Beach in January.

Gannett

Gannett Co. Chairman and President Allen H. Neuharth said he apologized for the surprise he delivered to some analysts attending the Paine Webber media conference last week. Contrary to some of their predictions, *USA Today*, Gannett's satellite-distributed national newspaper, had not yet "gone belly up." That wry opening preceded a detailed examination of *USA Today*'s progress and the state of the other aspects of Gannett's operations.

The total company, according to Neuharth, expects revenues to top $1.5 billion in 1982, up 10%, with broadcasting revenues in particular up 16% for the year. Television revenues gained 14% this year, radio 25%, with the latter's profits up "much, much more." Gannett's video production efforts are expanding, adding the 50/50 venture with Telepictures in the syndicated *Newscope* project to Gannett's half interest in *The MacNeil-Lehrer Report* production company and other projects, and the unit is "making money," according to Neuharth.

The $170 million total cost to Gannett of its three trade-ups and acquisitions in television ownership will yield an increase in its audience base from 3.6 million to 7.8 million—the fourth largest broadcast audience grouping after the three networks' owned station holdings.

And yes, as analysts were told, that means Gannett is doubling the audience base it gained through its purchase of Combined Communications, for half the price. However, Neuharth was quick to add, the $340 million Combined merger included outdoor advertising and newspaper properties that he said together accounted for 60% of that price.

Harte-Hanks

The recession lead Harte-Hanks to closely evaluate all its operations, President Robert G. Marbut told the Paine Webber conference Tuesday, with an eye to improving mainstream operations and eliminating marginal areas. That's going to mean Harte-Hanks will look to dispose of two radio properties in the markets where it operates only one station—Memphis and Birmingham, Ala. But that policy and the at times "traumatic" realignments the company has made in the past year in its radio division have left the eight other stations in a "much stronger" position today.

In television, the company's policy, called "III R," focused on "smart pricing and programing during the political year" so that 80% of incremental revenues dropped to the bottom line. In October, the Harte-Hanks television stations carried $1.5 million in political advertising.

Looking to next year, Harte-Hanks expects broadcast revenues to grow 7% to 11%, the group's payroll expenses to climb 6% to 9% and film and other expenses to increase 9% to 12%.

The decision to divest the two radio stations was not, the company said, tied to the capital commitment it has earmarked for expansion of its cable operations. In that business, Harte-Hanks currently owns systems passing 62,500 homes, with 26,500 subscribers. It also has an

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option to purchase other systems it manages, with the option beginning in June 1984, although the company declined to put a price on that option.

Multimedia

Multimedia is looking for 1983 to yield 17% to 19% growth in revenues, and to "bring a good share of that to the profit line." That was the word President Walter Bartlett and Vice Chairman Donald J. Barhyte had for Paine Webber's conference. Broadcast revenues should advance 10% to 12% in the next year, with radio up 15% and television up 10% to 11%.

In addition to the Ronnie Milsap special, Multimedia plans to add a third country series to its syndicated lineup for 1983. And with *Donahue* now in 210 markets, Bartlett noted that the deal Multimedia has crafted for inserts by Phil Donahue for ABC's *Last Word* series "more than replaces" the revenues that had been generated by such inserts for NBC's *Today*.

The expansions of Multimedia's cable operations show up in the company's capital budgeting for this year and next. In 1982, the company will have spent $18 million on cable out of a total $31 million capital program; next year $16 million of a $30 million budget is earmarked for cable. Multimedia expects to close 1982 with 190,000 subscribers, making it the 25th largest MSO, with revenue per subscriber averaging $20.10 a month, the seventh highest in the nation.

Of particular interest to the analysts was Multimedia's discussion of the workings of a regional pay sports operation it has set up with three Kansas basketball teams. The company said it got a 15% pay-to-basic penetration with a package of 15 games sold to consumers at $78 and commercial establishments for $750.

And while the company is active both in program production and cable, it has no intentions now to sell its programing to cable—and won't, "not until they pay enough."

Dow Jones

Dow Jones, with its principal operations firmly rooted in publishing, notably *The Wall Street Journal*, has weathered the recession rather well, analysts heard last Wednesday at the Paine Webber media conference.

At the same time, the company managed to secure $20 million worth of radio and television commercial time, as tallied by President Ray Shaw, through per inquiry advertising for which it only pays commissions on inquiries, and in exchange for the barter programing it makes available to broadcast stations. The company separately packaged a major market live news broadcast for television, which it sells to national advertisers, but even that helps to get *The Wall Street Journal* name reinforced throughout the day and night.

Dow Jones Information Services President William Dunn provided some further rundowns of the company's varied efforts in electronic media, noting that the on-line Dow Jones News Information Retrieval Service now serves 55,000 customer terminals, up from 30,000 last year, and has expanded the agreements it had with 10 MSO's to introduce the service via cable to systems passing 360,000 homes to cover 20 MSO's and 1.25 homes passed. The week earlier, Dunn noted, that service was inaugurated in another cable system in Fort Lee, N.J. By 1986, Dunn said, the company thinks it will have 250,000 on-line customers for its service.

As to whether Dow Jones might introduce a service similar to the Financial News Network, Shaw told one analyst that a daytime service "is not an area top on our priority list." The company thinks it can reach a larger audience with its current strategy of aiming for the evening and drive time radio markets.

Affiliated Publications

John Giuggio, president and chief operating officer of Affiliated Publications, publisher of the *Boston Globe* and group radio owner (five AM's and five FM's), told analysts attending last week's Paine Webber conference that the company's broadcast revenues for 1982 would total $15 million. And revenues for 1983, he said, would probably increase by about 10%.

Affiliated has a joint 45% interest in McCaw Communications, a Bellevue, Wash., MSO. The two companies have entered into a joint venture to purchase cable systems in southern Oregon, which together with the McCaw holdings, will give Affiliated a stake in 100,000 cable subscribers, said Giuggio, and perhaps 225,000 subscribers by 1985. Revenues for McCaw in 1983 are projected at $20 million, with an additional $10 million for the joint venture. The cable MSO is also involved in the radio common carrier business and has interests (in whole or in part) in cellular radio applications for six markets, and will apply for another four markets in March 1983.

Affiliated's *Boston Globe* also has a joint venture with Knight-Ridder Newspapers which may result in the startup of a videotext service in the Boston market, pending the outcome of Knight-Ridder's planned videotext trial in southern Florida in 1983. If that experiment goes well, Viewtron New England would be launched in the fall of 1984.

UPI raises rates 6.3%

United Press International announced last week that it is increasing its service rates for both print and electronic media clients by 6.3%, effective January 1983, the lowest annual increase in 20 years, it says. During that time the annual rate increase has ranged between 9% and 10%. (Several weeks ago, the Associated Press announced that it was increasing its rates by 9.5% [BROADCASTING, Nov. 22]).

"UPI will need new revenues in 1983," said Thomas Beatty, vice president and general sales manager of the wire service, "but a big assessment is not the answer during this recession, which has affected the entire news industry. It's hoped that those revenue needs can be met by adding a sufficient number of new clients in the coming year."

In a letter to subscribers, Beatty said that improvements in the UPI product were planned for 1983. A UPI spokesman explained that meant the opening of additional news bureaus and the introduction of new topical features on the news wires.

The company is spending about $11 million to convert to satellite distribution, including the installation of 2,000 earth stations, 600 of which have already been installed. The remaining 1,400 should be in place by the end of 1983. With the satellite system in place, UPI believes it can save half of the $14 million it now pays annually for long-line service.

In the last four months, UPI has generated $2.5 million in new business commitments. The company was purchased from E.W. Scripps Co., by Media News Corp., last June (BROADCASTING, June 14). □

AAF conference: Future in self-regulation

Sixth annual advertising law conference points to explosion in new technologies as boon to advertising but, say speakers, industry must regulate itself where government leaves off

For advertisers, the time ahead would appear to hold bright promise. The proliferation of telecommunications technologies should be a boon. So should the present tendency of government to deregulate. But a little freedom, it seems, goes a long way. It would be well for broadcasters and advertisers to engage in self-regulation.

That was the message that came through in the American Advertising Federation's sixth annual advertising law conference, in Washington, last week. And it wasn't only talk of self-regulation that provided a sobering note for the 120 who attended. A representative of the Federal Trade Commission, written off as a toothless tiger under Chairman James Miller, warned against believing "the misperceptions" regarding the agency he said are current. And AAF President Howard Bell was worried that the legislative veto Congress adopted in 1980 to curb the rambunctious FTC under Michael Pertschuk might be declared unconstitutional by the Supreme Court.

FCC Chairman Mark S. Fowler and Representative Tim Wirth (D-Colo.), chairman of the House Telecommunications Subcommittee, both talked of the benefits advertisers would derive from the explosion in telecommunications technologies. "With the growth in new technologies over the next decades," Fowler said, "the voice of advertisers will become more powerful."

And both talked, also, about the glories of the marketplace as against government regulation, although Fowler is willing, while Wirth is not, to consider extending the deregulation the commission has granted radio—elimination of guidelines regarding commercial time and nonentertainment programing is part of the package—to television. Wirth does not think the video market is sufficiently competitive.

The conference occurred in the wake of a federal judge's acceptance last month of the consent decree that ended the Justice Department's antitrust suit against the National As-

dent (50.5%) and three others. (BAL-820927FO). Action Nov. 24.

Facilities changes

AM Actions

■ KUET (710 khz) Black Canyon, Ariz.—Granted modification of CP (BP-800311AC) to change hours of operation by adding 1 kw-N, DA-2; major environmental action under section 1.1302. Action Nov. 23.

■ KAYT (970 khz) Rupert, Idaho—Granted CP to increase power to 2.5 kw and correct TL and SL. Action Nov. 19.

■ KXLA (990 khz) Rayville, La.—Granted CP to change hours of operation to U by adding 250 w-N; increase D power to 1 kw; install DA-2; change TL, and make changes in ant. sys.; major environmental action under section 1.1305. Action Nov. 23.

■ KERR (750 khz) Polson, Mont.—Granted CP to change frequency to 750 khz; increase critical hours to 50 kw; change from DA-2 to DA-N. Action Nov. 24.

■ KVEG (1400 khz) North Las Vegas—Granted modification of CP (BP-781103AL) to augment N directional pattern. Action Nov. 23.

■ WCEL (990 khz) Southern Pines, N.C.—Granted CP to increase power to 1 kw. Action Nov. 24.

FM actions

■ KNTO (95.9 mhz) Livingston, Calif.—Granted modification of CP (BPH-790117AB) to change station location; change TL and respecify SL and RC. Action Nov. 19.

■ *WWEV (89.5 mhz) Cumming, Ga.—Granted modification of CP (BPED-800616BA) to make changes in ant. sys.; change type of trans.; change type of ant.; correct geographical cooridnates to read 34 14' 04" and 42 09' 42". Action Nov. 17.

■ WMRI (106.9 mhz) Marion, Ind.—Granted CP to change TL; change ERP to 50 kw and make changes in ant. sys.; major environmental action under section 1.1305. Action Nov. 20.

■ KSOF (91.1 mhz) Wichita, Kan.—Granted CP to change TL; increase HAAT to 345 ft., and make changes in ant. sys. Action Nov. 17.

■ WUSM (91.1 mhz) North Dartmouth, Mass.— Granted CP to increase ERP to 1.209 kw. Action Nov. 17.

■ WMBN-FM (96.7 mhz) Petoskey, Mich.—Data filed 8-24-82 in accordance with FCC's first report and order adopted 11-30-81 and released 12-3-81 in Doc. 81-504 showing proposed operation on frequency of 96.3 mhz and make changes in ant. sys.; major environmental action under section 1.1305. Action Nov. 24.

■ KIEE (100.7 mhz) Harrisonville, Mo.—Granted CP to make changes in ant. sys.; change TL; change type trans.; change type ant.; increase ERP to 100 kw; increase HAAT to 664 ft., and change TPO; major environmental action under section 1.1305. Action Nov. 16.

■ KQNM (93.7 mhz) Gallup, N.M.—Granted CP to change ERP to 61.5 kw and change HAAT to 162.4 ft. Action Nov. 19.

■ WDJQ (92.5 mhz) Alliance, Ohio—Granted CP to change TL; increase ERP to 20 kw; increase HAAT to 500 ft., and change TPO. Action Nov. 23.

■ KPRB-FM (92.7 mhz) Redmond, Ore.—Data filed 7-9-82 in accordance with FCC's first report and order adopted 7-9-81 and released 9-17-81 in Doc. 81-438 showing proposed operation on frequency of 102.9 mhz; decrease ERP to 2 kw; increase HAAT to 354 ft., and change TPO. Action Nov. 23.

■ WQLO-FM (98.7 mhz) Beaufort, S.C.—Granted CP to change TL; change ERP to 100 kw; change HAAT to 597 ft., and make changes in ant. sys.; major environmental action under section 1.1305. Action Nov. 19.

■ KWLW (93.9 mhz) San Angelo, Tex.—Granted CP to change TL; change ERP to 100 kw; change HAAT to 698 ft., and make changes in ant. sys.; major environmental action under section 1.1305. Action Nov. 19.

■ WIZM-FM (93.3 mhz) La Crosse, Wis.—Granted CP to change TL; increase HAAT to 1,021 ft., and change TPO. Action Nov. 17.

TV actions

■ WSTE (ch. 13) Fajardo, P.R.—Granted MP (BPCT-2439, as mod.) to change ERP to 170 kw visual, 17 kw aural, and change HAAT to 2,825 ft. Action Nov. 10.

■ KBTX-TV (ch. 3) Bryan, Tex.—Granted CP to change ERP to 70 kw visual, 7 kw aural; change trans.; and make changes in ant. sys. Action Nov. 17.

In Contest

FCC actions

■ FCC granted Waters Broadcasting Corp. CP for new FM on 105.3 mhz at Hart, Mich., thereby reversing Review Board decision which granted CP to competing application of West Michigan Broadcasting Co. Review Board based its award on West Michigan's management integration proposal and local residence and past civic participation of its principals. Although Review Board considered Waters' 100% female minority ownership advantageous, principal lived in Muskego, Mich., 30 miles from Hart. FCC said Board did not give enough credit to Waters for local residence and past participation in civic-activities, and should not have held West Michigan's enhancement for local residence and civic activities of its principals above Waters' enhancement for minority and female ownership. Action Oct. 21.

■ FCC Review Board granted Hassayampa Broadcasting CP for new FM on 105.5 mhz at Wickensburg, Ariz., and denied competing application of Shoblom Broadcasting Inc. Review Board affirmed ALJ Byron Harrison's decision which found Hassayampa superior on grounds of diversification of media interests [Shoblom owns KUUK(AM) Wickensburg] and integration of ownership with management. Action Nov. 23.

■ FCC granted New England Broadcasting Inc. limited access to attachments to letter withheld under Freedom of Information Act in FCC's investigation of relationship between Robert R. Rowell, former president and owner of WMOU(AM)-WXLQ(FM) Berlin, N.H., to interim operator of stations, Community Broadcasting Association of Berlin Inc. Action Nov. 24.

■ FCC renewed license of WAVS(AM) Fort Lauderdale after determining licensee had not made misrepresentations to FCC or transferred control of station without authorization. Action Dec. 2.

■ FCC denied request by Faith Center Inc. to disqualify ALJ presiding in comparative renewal case involving KVOF-TV San Francisco. Action Dec. 2.

■ FCC denied without comment Loyola University's application for review of staff decision that Loyala lacked standing to participate formally in Conroe, Tex., AM radio comparative proceeding. Action Dec. 2.

■ FCC denied Anthony B. Martin-Trigona review of Broadcast Bureau dismissal of his petition for reconsideration with respect to licensee renewal applications of WTNH-TV New Haven, Conn., and WPRO-AM-FM Providence, R.I. Action Dec. 2.

Call letters

Applications

Call	*Sought by*
	New FM's
WIMV	Madison Communications Corp., Madison, Fla.
WFMM	LDM Broadcasters Inc., North Muskegon, Mich.
KBEV	Beverly J. McKee, Milbank, S.D.
	New TV's
KTVJ	Boulder Telecasting Corp., Boulder, Colo.
KXRM-TV	Light Communications Inc., Colorado Springs
KDRV	Sunshine Television Inc., Medford, Ore.
WBGV-TV	Quin-Abi Broadcasting Inc., Tullahoma, Tenn.
	Existing AM
WPFR	WAAC Terre Haute, Ind.
	Existing FM's
WEGN-FM	WTII Evergreen, Ala.
WLYT	WHAV-FM Haverhill, Mass.
KBOZ-FM	KBZN Bozeman, Mont.
WWOK	WTHD Columbia, N.C.
WKQB	WDWQ St. George, S.C.
KAOC-FM	KGUL-FM Port Lavaca, Tex.
	Existing TV
KQOL-TV	KGPC Lawton, Okla.

Grants

Call	*Assigned to*
	New AM
WXKY	Cory Communications Inc., Milan, Tenn.
	New FM
KRFM	KBW Associates Inc., Show Low, Ariz.
	New TV's
WGRB	Green River Broadcasting Inc., Campbellsville, Ky.
WERF	Hazelton TV Associates, Hazelton, Pa.
	Existing AM's
WCOT	WLOF Orlando, Fla.
KIJN	KZOL Farwell, Tex.
	Existing FM's
WKYO-FM	WIDL Caro, Mich.
KFLQ	KNFR Albuquerque, N.M.
WLZN	WVCD Hazelton, Pa.
	Existing TV's
WRSP-TV	WBHW Springfield, Ill.
KSKN	KUAA Spokane, Wash.

Summary of broadcasting

FCC tabulations as of Sept. 30, 1982

	Licensed	*On air STA**	*CP's on air*	*Total on air*	*CP's not on air*	*Total authorized***
Commercial AM	4,668	0	0	4,668	153	4,822
Commercial FM	3,379	1	0	3,380	328	3,708
Educational FM	1,112	0	0	1,112	84	1,196
Total Radio	9,159	1	0	9,160	565	9,725
Commercial TV						
VHF	525	1	0	526	12	538
UHF	276	0	0	276	134	410
Educational TV						
VHF	104	1	3	108	8	116
UHF	163	2	4	169	15	184
Total TV	1,068	4	7	1,079	169	1,248
FM Translators	499	0	0	499	268	767
TV Translators						
VHF	2,754	0	0	2,754	265	3,019
UHF	1,654	0	0	1,654	392	2,046
Low power						
VHF	104	0	0	104	134	238
UHF	7	0	0	7	72	79

*Special temporary authorization

**Includes off-air licenses